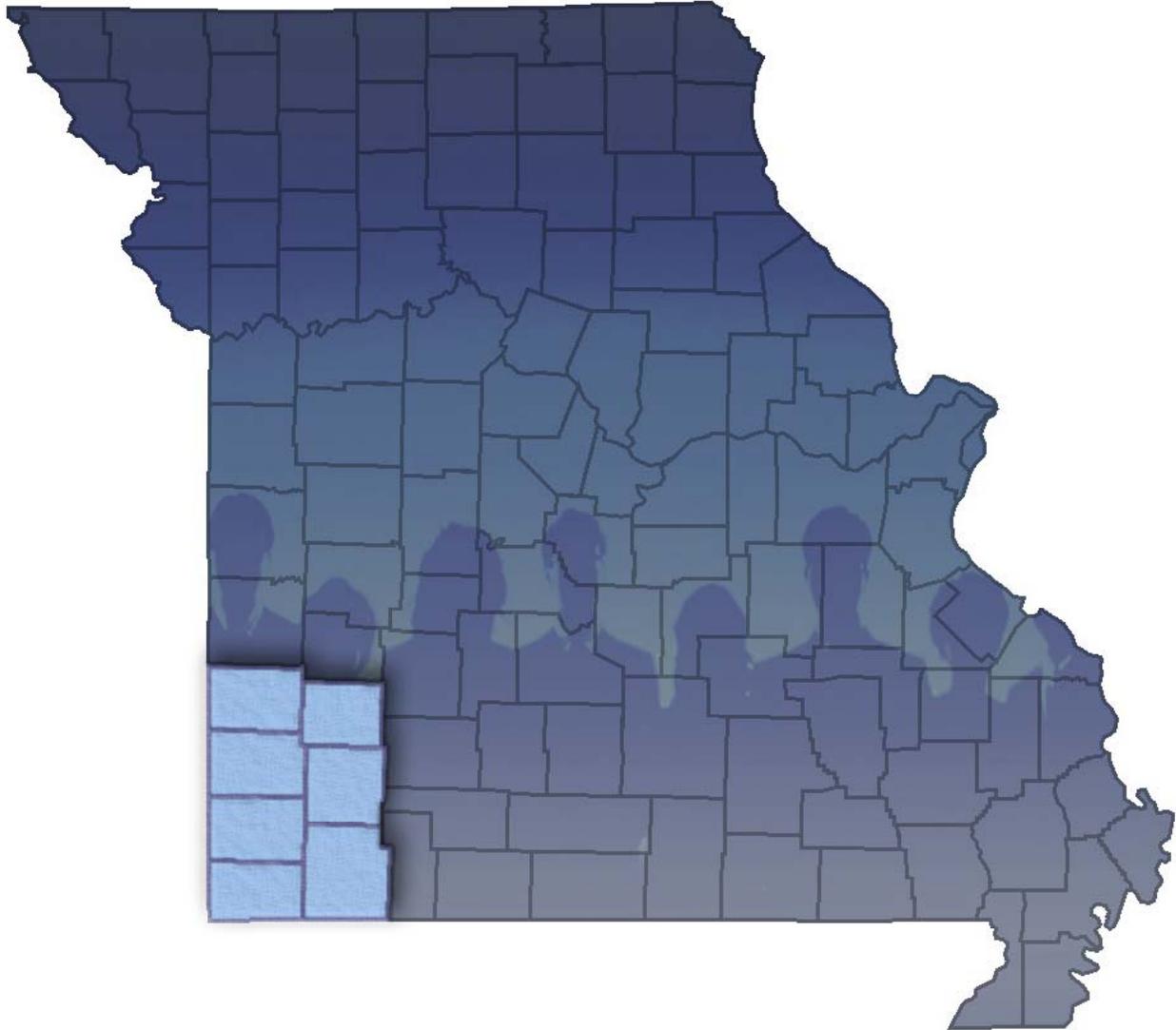


Missouri

Workforce Gap Analysis: Needs Assessment



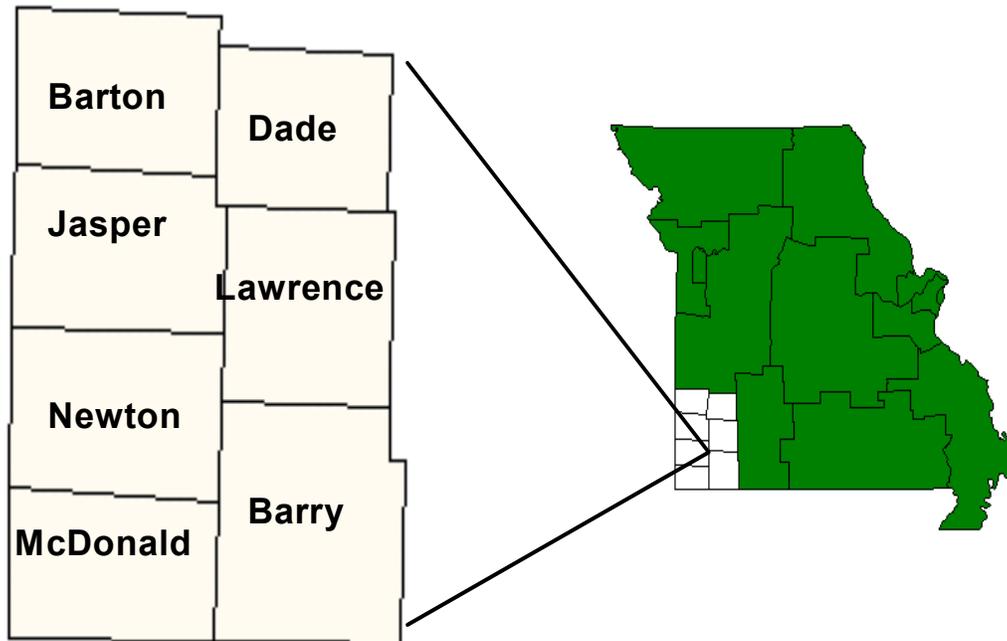
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Southwest Workforce Investment Area

301 W. High St. Room 580, Jefferson City, MO
65102
Tel: 573-751-3633; Fax: 573-751-7160

MISSOURI DEPARTMENT OF ECONOMIC DEVELOPMENT
MERIC
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The Southwest WIA Region



The Southwest Workforce Investment Area (WIA) consists of seven counties in the southwest corner of Missouri. It includes the Joplin Metropolitan Statistical Area (MSA), which consists of Jasper and Newton Counties. McDonald County is part of the Fayetteville-Springdale-Rogers, AR-MO MSA.

The Southwest WIA accounts for 4% of the state's workforce. Missouri Southern State University and Crowder College are located in the region. Birthplace of President Harry Truman, the area has successfully merged a rich history with a modern education and cultural environment resulting in a great quality of life.

The Workforce Gap Analysis Needs Assessment for the Southwest WIA shows that:

- Four of the six counties in the Southwest WIA have above average economic momentum.
- Only Newton and McDonald counties had higher unemployment rates than both the state (5.8%) and national rates (5.7%) in July of 2004.
- Poverty was much higher in the Southwest WIA (14.56%) than the Missouri average (11.74%) in 2000. Poverty is particularly pervasive in the very southern part of the region.
- The percentage of Southwest region workers earning a salary meeting the self-sufficiency standard is 78.75% for an adult with an infant, 47.80% for an adult with two children, 22.51% for two adults with two infants, and 11.55% for two adults with three children.
- The largest employing industries in the Southwest WIA include: the rest of retail, government, and medical services. The fastest growing industries in the region include: financial and business services, other transportation, and petroleum products. The highest paying industries in the Southwest WIA include: railroad, motor vehicles manufacturing, and public utilities.
- Occupations with the largest number of annual openings include: retail sales workers, cashiers, and food preparation/serving workers. These occupations have many openings each year, but pay less than \$15,000/year. The exception is registered nurses, which pay above average wages of \$32,000/year and require at a minimum an Associates Degree.
- Southwest workers laid off when an entire firm closes seem to increasingly gain more of their pre-layoff wage over a 1½ years. Whereas Southwest workers involved in individual layoffs seem to fluctuate in terms of being able to earn at least 80% of their pre-layoff earnings.
- Top new businesses formed in the Southwest region were in the retail trade, construction, and accommodation/food services sectors.
- A significant number of workers in Barry, Dade and McDonald counties commute 34 to 48 minutes to work, indicating that many Southwest residents work outside the region.
- The Educational Services sector has over 20% of its workforce over the age of 55. This means that in ten years this sector may potentially have problems finding enough qualified workers when their older workers retire. Meanwhile, many young workers find their first job opportunities in the accommodation and food services sector.

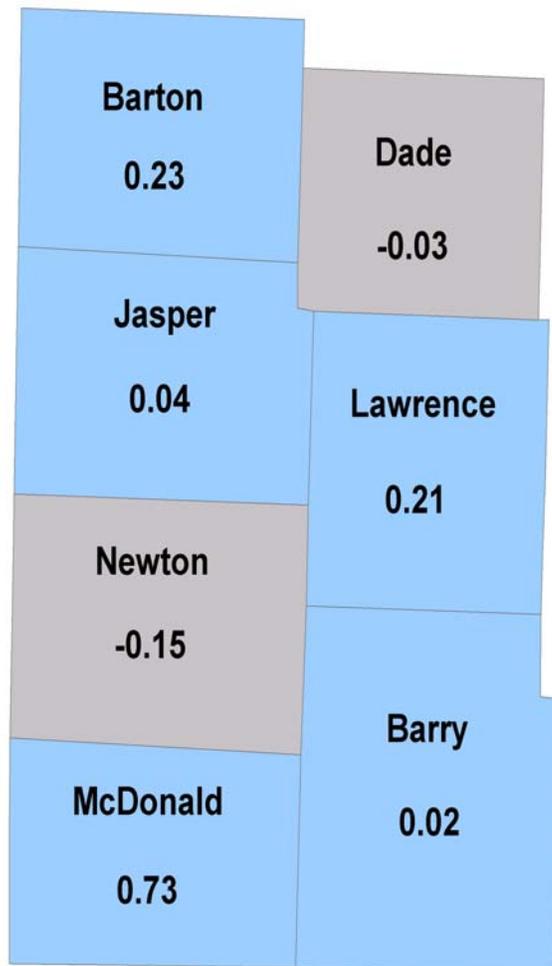
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What is Economic Momentum?

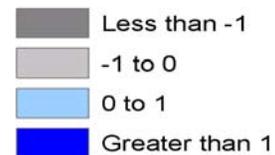
The Economic Momentum of an area is based on growth in employment, population, and income. An index score of “0” means that the county grew at the same rate as the state. The index thereby indicates areas of strong and weak economic momentum.

Counties with Notable Economic Momentum

- Within the Southwest region, the counties of Dade and Newton were the only areas with less than 0 on the Momentum Index.
- McDonald County had the highest Momentum Index score of .73 when compared to the rest of the region.



Economic Momentum



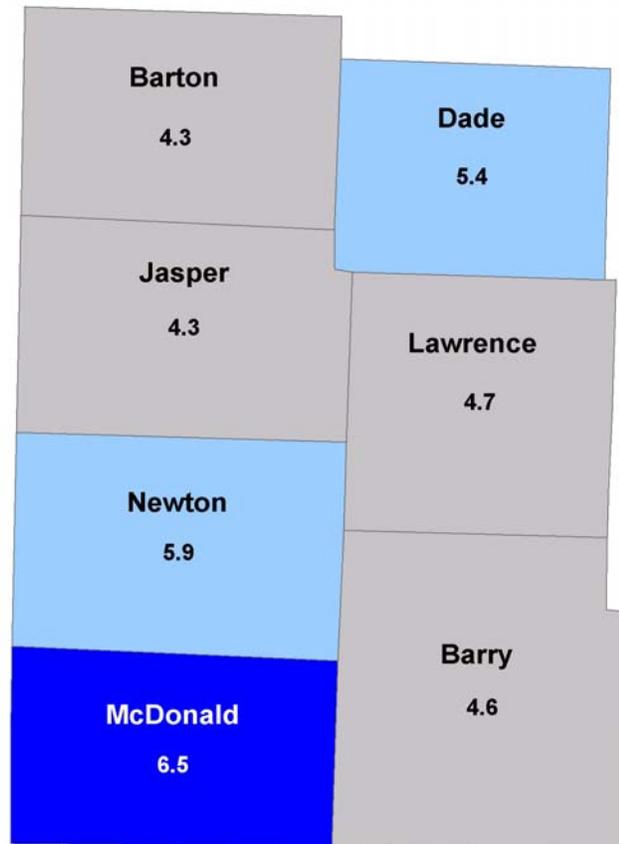
Workers Without Jobs

The unemployed population is defined as those who are over the age of 16 who were not working and were available for work. The unemployment rate is measured by calculating the number of unemployed persons as a percentage of the total labor force.

Percent of Population that is Unemployed

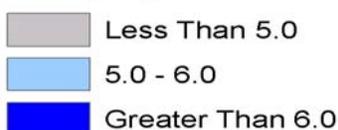
- The July 2004 unemployment rate for Missouri was 5.8%.
- The national unemployment rate was 5.7% for July 2004.
- Of all the Southwest WIA counties, only Newton and McDonald counties have higher unemployment rates than both the state and national averages.
- Across the region, unemployment rates decreased from July 2003-2004. Newton County had the largest decrease in unemployment.

Source: MERIC, with U.S. Bureau of Labor Statistics



Southwest WIA Region

Unemployment Rate



| Area | Jul-04 | | | | Jul-03 |
|----------|-------------|------------|--------------|------|--------|
| | Labor Force | Employment | Unemployment | Rate | Rate |
| Barry | 15,230 | 14,533 | 697 | 4.6% | 5.1% |
| Barton | 7,022 | 6,721 | 301 | 4.3% | 4.9% |
| Dade | 3,373 | 3,192 | 181 | 5.4% | 5.5% |
| Jasper | 55,454 | 53,051 | 2,403 | 4.3% | 5.4% |
| Lawrence | 16,403 | 15,640 | 763 | 4.7% | 5.4% |
| McDonald | 9,319 | 8,709 | 610 | 6.5% | 6.8% |
| Newton | 28,266 | 26,589 | 1,677 | 5.9% | 7.3% |

Regional Poverty

Department of
Economic Development

The poverty rate for a region is measured by the percentage of adults considered to be in poverty. The standards for poverty are set by the Federal government.

Percent of Population in Poverty

- The percentage of the total Southwest WIA region population that was categorized as being in a state of poverty was 14.56% in 2000.
- The overall Missouri poverty rate for the same time period was 11.74%, significantly lower than the rate for the Southwest WIA region.

What do these numbers mean?

- Some individuals in the Southwest WIA region may have lower wages and annual incomes than other regions in Missouri.
- Poverty is particularly pervasive in the very southern part of the region.

Source: MERIC, using U.S. Census Data

Southwest WIA Region



This mapping data is based on block-group level estimates from the census long form, which an average of 1 out of 6 households received. The maps should be used to reveal demographic patterns, not pinpoint exact block group values.

Individuals Below Poverty Level

| |
|---------------|
| 30.1% - 82.8% |
| 20.1% - 30% |
| 12.5% - 20% |
| 6.1% - 12.4% |
| 0% - 6% |

Necessary Wages for Essential Needs

The Self-Sufficiency Standard for Missouri charts the actual costs of living and working in the region. It measures how much income a family needs to pay for housing, food, childcare, healthcare, transportation and taxes-if they do not receive any help from relatives, friends or the government-based on the ages, as well as number, of children in each household, and the family's geographic location.

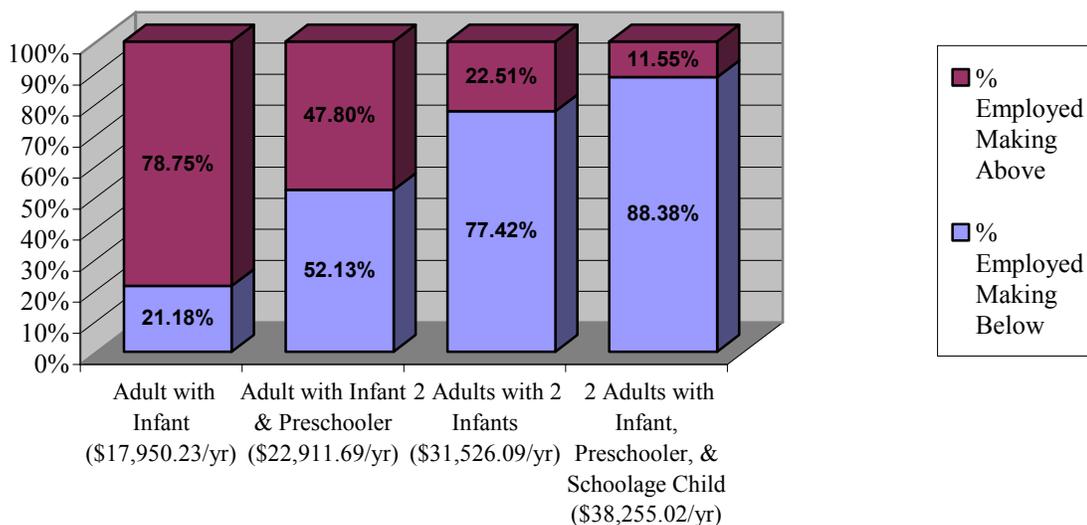
| Self-Sufficiency Standard for the Southwest Region | | | | | | |
|--|--------------------|----------------------------|--|--------------------|----------------------------------|--|
| County | Adult Annual | Adult with Infant** Annual | Adult with Infant and Preschooler** Annual | 2 Adults** Annual | 2 Adults with 2 Infants** Annual | 2 Adults with Infant, Preschooler and Schoolage child** Annual |
| Barry | \$11,990.28 | \$17,205.72 | \$22,018.32 | \$19,668.36 | \$30,148.20 | \$37,195.08 |
| Barton | \$11,852.88 | \$17,760.60 | \$22,351.68 | \$19,547.64 | \$31,553.16 | \$37,994.40 |
| Dade | \$11,807.76 | \$17,184.00 | \$21,791.28 | \$19,462.56 | \$30,109.92 | \$36,916.68 |
| Jasper | \$12,182.16 | \$20,210.04 | \$27,077.04 | \$19,860.24 | \$35,888.88 | \$43,689.72 |
| Lawrence | \$12,038.40 | \$17,195.64 | \$22,203.12 | \$19,910.64 | \$29,793.36 | \$38,220.60 |
| Mcdonald | \$11,936.04 | \$17,646.24 | \$21,934.32 | \$19,825.20 | \$30,842.52 | \$35,910.12 |
| Newton | \$12,188.28 | \$18,449.40 | \$23,006.04 | \$19,871.52 | \$32,346.60 | \$37,858.56 |
| Average | \$11,999.40 | \$17,950.23 | \$22,911.69 | \$19,735.17 | \$31,526.09 | \$38,255.02 |

Source: MERIC

**Original report by Diana Pearce, Ph..D. with Jennifer Brooks.

Are Employed Persons in the Southwest Making Self-Sufficiency Wages?

% of Workers Earning the Self-Sufficiency Wage in the Southwest Region



Regional Industry Overview

Department of
Economic Development

Top Employing Industries

The largest employing industries in the Southwest WIA include the *rest of retail, government, medical services, farming, and trucking.*

In terms of national competitiveness, the trucking and farm sectors are most competitive while the miscellaneous business services sector is the least competitive.

SOUTHWEST WIA - TOP EMPLOYING INDUSTRIES

| INDUSTRY | JOBS 2002 | GROWTH 1992-2002 | AVERAGE WAGES | NATL COMPETITIVENESS | NATL PRODUCTIVITY |
|-------------------|--------------|---------------------|------------------|----------------------|-------------------|
| | | | | INDEX | INDEX |
| Rest of Retail | 20,886 | 36.01 | \$15,290 | 1.10 | 1.00 |
| Government | 19,457 | 19.21 | \$30,878 | 0.67 | 0.81 |
| Medical | 14,483 | 22.11 | \$25,471 | 1.18 | 0.99 |
| Farm | 13,437 | (4.18) | \$2,440 | 1.78 | 0.41 |
| Trucking | 10,024 | 33.70 | \$27,612 | 3.96 | 1.00 |
| Construction | 9,279 | 39.61 | \$15,256 | 0.98 | 1.00 |
| Eating & Drinking | 9,165 | 21.04 | \$10,557 | 1.06 | 1.00 |
| Food | 8,810 | 8.15 | \$24,737 | 5.37 | 1.00 |
| Misc. Bus Serv | 7,147 | 126.49 | \$15,472 | 0.60 | 1.02 |
| Non-Profit Org | 6,071 | 34.99 | \$14,021 | 1.02 | 0.98 |

1.00 is the US average for Competitiveness Index and Productivity Index.

Top Employers in Southwest WIB by Employees

| Company | Description | NAICS |
|-----------------------------------|--|--------|
| Able Manufacturing Corp. | Motor Vehicle Body Mfg | 336211 |
| Cardinal Scale Mfg Co. | Scale & Balance, Except Laboratory, Mfg | 333997 |
| Detecto Scale Co. | Surgical & Medical Instrument Mfg | 339112 |
| E Z Dock | Other Heavy Construction | 237990 |
| Eagle-Picher Technologies Div. | Storage Battery Mfg | 335911 |
| EFCO Corp. | Aluminum Extruded Prod Mfg | 331316 |
| Fasco Industries Inc. | Motor & Generator Mfg | 335312 |
| Freeman Health Systems | General Medical & Surgical Hospitals | 622110 |
| General Mills | Frozen Specialty Food Mfg | 311412 |
| George'S Poultry Processing | Poultry Processing | 311615 |
| Jack Henry & Assoc Inc. | Custom Computer Programming Services | 541511 |
| La-Z-Boy Midwest | Furniture Stores | 442110 |
| Leggett & Platt Inc. | Misc Wood Prod Mfg | 321999 |
| Miracle Recreation Equipment | Sporting Goods Stores | 451110 |
| Schreiber Foods | All Other Specialty Food Stores | 445299 |
| Simmons Foods Inc. | Poultry Processing | 311615 |
| St John'S Regional Medical Center | General Medical & Surgical Hospitals | 622110 |
| Sunbeam Outdoor Products | Household Cooking Appliance Mfg | 335221 |
| Thorco Industries Inc. | Showcases, Partitions, Shelving, & Lockers | 337215 |
| Twin River Foods Inc. | Packaged Frozen Food Merchant Wholesaler | 424420 |
| Tyson Foods Inc. | Poultry Processing | 311615 |
| Wal-Mart Supercenter | Department Stores, Except Discount | 452111 |

Fast Growing Industries

The fastest growing industries in the Southwest WIA include *financial and business services, other transportation, petroleum products, and agriculture, forestry and fishing.*

Most of the fast growing industries have low employment bases, pay lower wages, and are not nationally competitive. However, the petroleum products industry, primarily asphalt, pays above average wages and is one of the area's most nationally competitive industries.

SOUTHWEST WIA - TOP GROWING INDUSTRIES

| INDUSTRY | JOBS 2002 | GROWTH 1992-2002 | AVERAGE WAGES | NATL COMPETITIVNESS | NATL PRODUCTIVITY |
|--------------------|--------------|---------------------|------------------|---------------------|-------------------|
| | | | | INDEX | INDEX |
| Credit & Finance | 726 | 227.97 | \$15,126 | 0.26 | 1.04 |
| Misc. Bus Serv | 7,147 | 126.49 | \$15,472 | 0.60 | 1.02 |
| Other Transport | 253 | 87.58 | \$29,430 | 0.33 | 1.02 |
| Petro Products | 1,001 | 85.21 | \$42,843 | 8.27 | 0.99 |
| Agri&For&Fish Serv | 2,966 | 79.41 | \$9,548 | 1.25 | 1.00 |
| Real Estate | 2,469 | 71.17 | \$4,691 | 0.54 | 0.99 |
| Education | 804 | 64.89 | \$11,590 | 0.25 | 1.01 |
| Air Transportation | 140 | 62.41 | \$39,605 | 0.11 | 1.04 |
| Misc. Prof Serv | 3,222 | 56.96 | \$12,596 | 0.42 | 1.02 |
| Motor Vehicles | 720 | 50.41 | \$56,478 | 0.77 | 1.04 |

1.00 is the US average for Competitiveness Index and Productivity Index.

SOURCE: REMI-MERIC.

Top Paying Industries

The highest paying industries in the Southwest WIA include *railroad, motor vehicles manufacturing, and public utilities sectors.*

In addition, the instruments, rest of transportation equipment, petroleum products (asphalt) and chemicals manufacturing industries also pay higher wages of \$40,000 and above.

SOUTHWEST WIA - TOP PAYING INDUSTRIES

| INDUSTRY | JOBS 2002 | GROWTH 1992-2002 | AVERAGE WAGES | NATL COMPETITIVNESS | NATL PRODUCTIVITY |
|--------------------|--------------|---------------------|------------------|---------------------|-------------------|
| | | | | INDEX | INDEX |
| Railroad | 351 | (27.40) | \$67,888 | 1.99 | 1.00 |
| Motor Vehicles | 720 | 50.41 | \$56,478 | 0.77 | 1.04 |
| Public Utilities | 1,037 | (4.91) | \$50,557 | 1.28 | 0.98 |
| Instruments | 15 | (61.86) | \$45,004 | 0.02 | 0.98 |
| Rest Trans Equip | 77 | 41.49 | \$44,525 | 0.10 | 1.03 |
| Petro Products | 1,001 | 85.21 | \$42,843 | 8.27 | 0.99 |
| Chemicals | 577 | (40.55) | \$41,429 | 0.59 | 0.99 |
| Air Transportation | 140 | 62.41 | \$39,605 | 0.11 | 1.04 |
| Communication | 876 | 13.41 | \$38,888 | 0.51 | 1.00 |
| Paper | 327 | 44.77 | \$33,080 | 0.54 | 1.00 |

1.00 is the US average for Competitiveness Index and Productivity Index.

SOURCE: REMI-MERIC.

Top Openings by Occupation

Occupations with the largest number of annual openings (new jobs + replacements) include:

- Retail sales workers, cashiers, food preparation and serving workers, and waiters and waitresses.

Although these occupations have over 100 openings each year, they pay very low wages, less than \$15,000 per year, and require minimal education and experience.

The exception is registered nurses which have nearly 100 annual openings yet pay above average wages of \$32,000 per year and require at a minimum an Associates Degree.

SOUTHWEST WIA - TOP OPENINGS BY OCCUPATION

| OCCUPATION | PERCENT CHANGE | ANNUAL OPENINGS | ENTRY WAGE | AVERAGE WAGE | TYPICAL SOURCE OF TRAINING |
|--|----------------|-----------------|------------|--------------|-----------------------------------|
| Retail Salespersons | 13.23 | 189 | \$12,908 | \$16,613 | Short-term on-the-job training |
| Cashiers | 9.91 | 176 | \$12,521 | \$14,696 | Short-term on-the-job training |
| Combined Food Preparation and Serving Workers | 27.21 | 175 | \$12,282 | \$15,827 | Short-term on-the-job training |
| Waiters and Waitresses | 16.61 | 123 | \$14,229 | \$18,540 | Short-term on-the-job training |
| Registered Nurses | 27.57 | 97 | \$32,231 | \$41,595 | Associate degree |
| Truck Drivers, Heavy and Tractor-Trailer | 1.48 | 94 | \$25,721 | \$29,438 | Moderate-term on-the-job training |
| Office Clerks, General | 9.91 | 82 | \$16,294 | \$18,320 | Short-term on-the-job training |
| Laborers and Freight, Stock, and Material Movers | 4.31 | 77 | \$15,288 | \$18,301 | Short-term on-the-job training |
| Nursing Aides, Orderlies, and Attendants | 20.03 | 56 | \$15,763 | \$18,769 | Short-term on-the-job training |
| Supervisors/Managers of Retail Sales Workers | 6.06 | 54 | \$18,748 | \$27,194 | Work experience in a related occp |

SOURCE: Long-Term Projections, MERIC-MODED and ETA-USDOJ.

How Job Openings Affect the Region

- Based on this information, the highest demand jobs over the next ten years will require minimal skills or on-the-job training, thus not placing major strains on the local educational system.
- However, the need for about 100 RNs each year over the next decade will require local educational institutions to expand or develop nursing programs to fill this need; or the Southwest WIA will have to recruit nurses from outside the region.

Fastest Growing Occupations

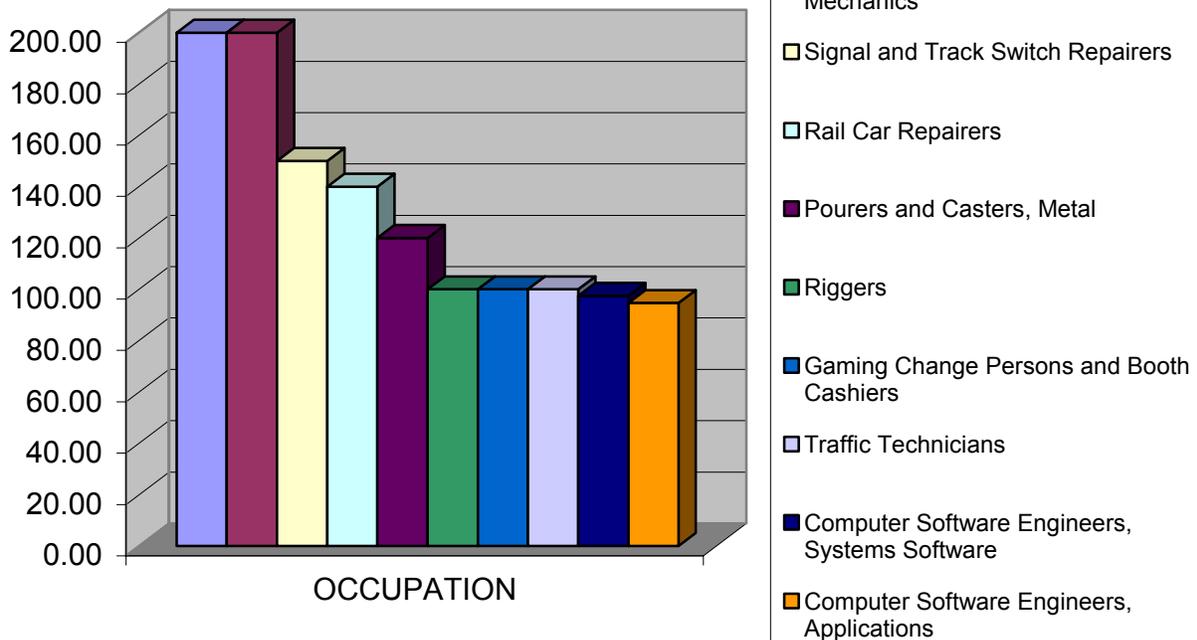
The fastest growing occupations in the Southwest WIA are related to transportation, construction and information technology careers. Although the employment base and number of openings are small, these occupations generally pay higher wages.

SOUTHWEST WIA - TOP GROWING OCCUPATIONS

| OCCUPATION | PERCENT CHANGE | TYPICAL SOURCE OF TRAINING |
|---|----------------|-----------------------------------|
| Survey Researchers | 200.00 | Bachelor's degree |
| Electrical and Electronic Equipment Mechanics | 200.00 | Vocational education |
| Signal and Track Switch Repairers | 150.00 | Long-term on-the-job training |
| Rail Car Repairers | 140.00 | Long-term on-the-job training |
| Pourers and Casters, Metal | 120.00 | Moderate-term on-the-job training |
| Riggers | 100.00 | Short-term on-the-job training |
| Gaming Change Persons and Booth Cashiers | 100.00 | Short-term on-the-job training |
| Traffic Technicians | 100.00 | Short-term on-the-job training |
| Computer Software Engineers, Systems Software | 97.50 | Bachelor's degree |
| Computer Software Engineers, Applications | 94.67 | Bachelor's degree |

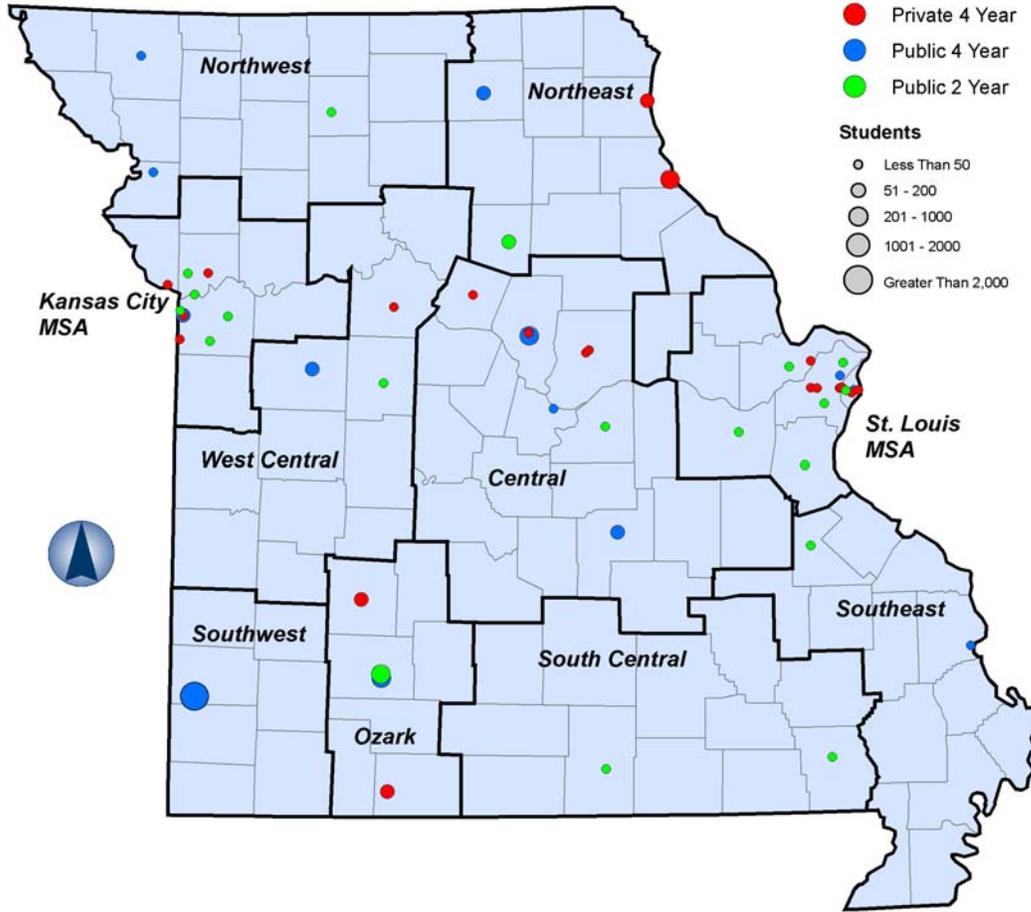
SOURCE: Long-Term Projections, MERIC-MODED and ETA-USDOL.

**Percent Change of
Top Growing Occupations**



The number of students from the Southwest region that go on to attend college describes whether or not local high school graduates go inside or outside the region to meet their post-secondary educational needs.

Where High School Students from the Region go to College



Southwest WIA Region

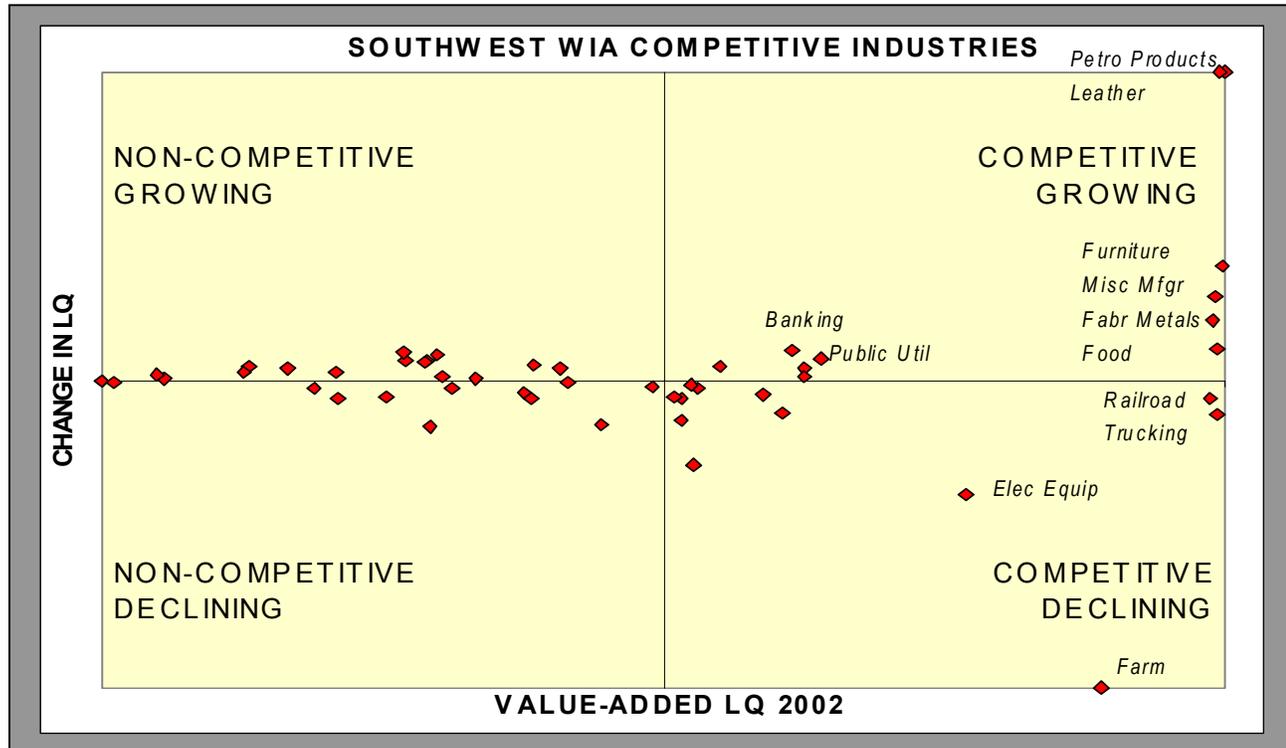
Post-Secondary Institutions with 20 or More Undergraduates from the Southwest Region (Fall of 1999-2003)

| 20-50 students | 50-100 students | 100-250 students | 250-500 students | 500-1000 students | 1000-4000 students | 4000-6000 students |
|-----------------------|-----------------------|------------------|-------------------------|-------------------|--------------------|--------------------|
| Northwest MSU | SW Baptist Univ. | UMKC | UM-Columbia | SMSU | Crowder | Southern |
| Evangel Univ. | Truman State | Moberly Area CC | OTC | | | |
| SEMO | CMSU | UMR | Hannibal-Lagrange Coll. | | | |
| Missouri Valley Coll. | College of the Ozarks | Drury Univ. | | | | |
| Fontbonne Univ. | Culver-Stockton Coll. | | | | | |
| William Jewell Coll. | | | | | | |

Source: Statistical Summary of Higher Education

Industries Competing On a National Level

The Southwest WIA has 23 nationally competitive industries, of which 11 are growing and 12 are declining. Competitiveness means that the Southwest WIA has a competitive advantage in these industries relative to the rest of the United States, indicating that the WIA is highly specialized in these sectors in terms of value-added.



The top competitive and growing industries include:

- ***Petroleum products, leather manufacturing, furniture manufacturing, miscellaneous manufacturing, fabricated metal products, and food manufacturing***

It is expected that these industries will continue to be the competitive drivers of the Southwest WIA economy.

The top competitive but declining industries include:

- Farming, electrical equipment manufacturing, trucking, and railroads
These industries are in danger of losing their competitive advantage, to the detriment of the Southwest WIA.

Regional Target Industries

Department of
Economic Development

How are Life Science Industries defined?

Life Science Industries are those industries that use life-saving and life-enhancing technologies to improve the quality of life for people. These companies employed 5.57% (145,698) of the state's total workforce in 2003. The concentration of Life Science Industries in the Southwest region during the same time period was 5.01% of the state's total Life Science Employment.

| Employment in Life Sciences (2003) | | | |
|------------------------------------|----------------|---------------------|---------------------|
| County | # of Employees | # of Establishments | Annual Wage Per Job |
| Barry | 620 | 12 | \$30,797.20 |
| Barton | 25 | 4 | \$23,443.19 |
| Dade | N/D | N/D | N/D |
| Jasper | 3014 | 36 | \$33,807.82 |
| Lawrence | 336 | 11 | \$35,095.74 |
| McDonald | N/D | N/D | N/D |
| Newton | 3284 | 19 | \$43,118.88 |
| Southwest WIA | 7294 | 85 | \$37,730.10 |

* N/D: Unable to disclose data due to Bureau of Labor Statistics confidentiality restrictions.

Source: MERIC, Bureau of Labor Statistics

What are Advanced Manufacturing Industries?

High-Technology Industries that fall within the manufacturing sector are considered Advanced Manufacturing. During 2003, Advanced Manufacturing industries employed 4.13% (108,089) of the state's total workforce. The concentration of Advanced Manufacturing Industries in the Southwest region during the same time period was 3.24% of the state's total Advanced Manufacturing Employment.

| Employment in Advanced Manufacturing (2003) | | | |
|---|----------------|---------------------|---------------------|
| County | # of Employees | # of Establishments | Annual Wage Per Job |
| Barry | 710 | 10 | \$28,138.29 |
| Barton | 16 | 5 | \$25,204.77 |
| Dade | 47 | 5 | \$17,726.88 |
| Jasper | 1663 | 46 | \$33,806.99 |
| Lawrence | 313 | 13 | \$26,375.41 |
| McDonald | 100 | 4 | \$32,464.50 |
| Newton | 654 | 18 | \$31,703.10 |
| Southwest WIA | 3502 | 101 | \$31,309.57 |

* N/D: Unable to disclose data due to Bureau of Labor Statistics confidentiality restrictions.

Source: MERIC, Bureau of Labor Statistics

Regional Critical & In-Danger Occupations

Competitive and Growing Occupations

The occupations in a region that are competitive on a national scale and are in industries that show strong growth in terms of new job openings are important in terms of the fact that such industries are and will continue to be the competitive drivers of the Southwest WIA economy. The staffing patterns within each of these critical industries can show which occupations are critical in terms of continuing the region's high specialization in these sectors.

| Southwest Critical Occupations (Competitive-Growing) | | | |
|--|-----------------------|---------|--|
| SIC | Industry | SOC | Occupations |
| 60 | Banking | 43-3071 | Tellers |
| 52-59 | Rest of Retail | 41-2031 | Retail Salespersons |
| 31 | Leather | 51-6042 | Shoe Machine Operators and Tenders |
| 49 | Public Utilities | 49-9051 | Electrical Power-Line Installers and Repairers |
| 29 | Petro Products | 51-2092 | Team Assemblers |
| 20 | Food | 51-3022 | Meat, Poultry, and Fish Cutters and Trimmers |
| 7 | Agricultural Services | 37-3011 | Landscaping and Groundskeeping Workers |
| 31 | Leather | 51-6031 | Sewing Machine Operators |
| 39 | Misc. Manufacturing | 51-2092 | Team Assemblers |
| 52-59 | Rest of Retail | 41-2011 | Cashiers |

Source: MERIC, U.S. Bureau of Labor Statistics

Non-Competitive and Declining Occupations

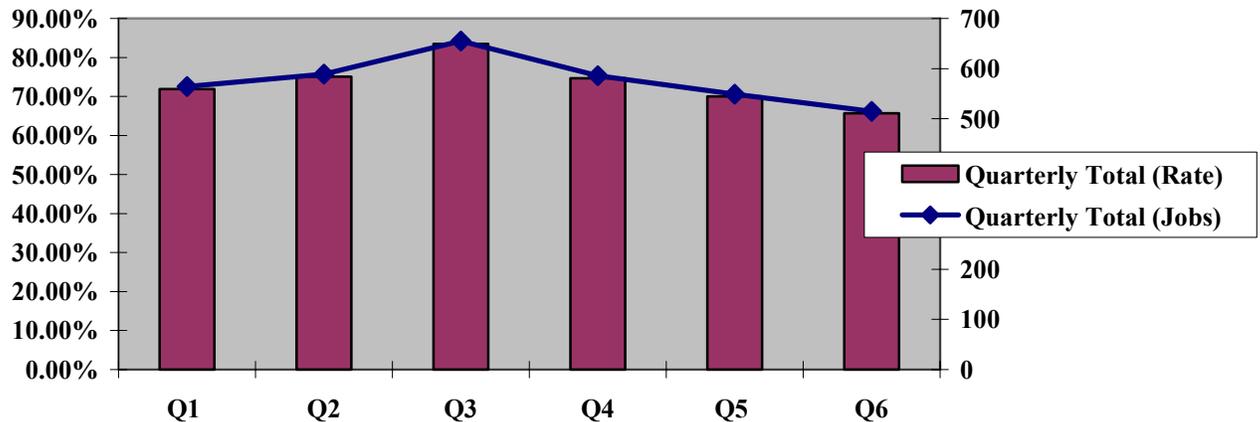
Likewise the occupations in a regions that are not competitive on a national scale or within industries that show declining growth in terms of new job openings are important for both currently employed workers in those occupations and for job seekers deciding which career paths to move toward.

| Southwest In-Danger Occupations (Non-Competitive-Declining) | | | |
|---|----------------------|---------|--|
| SIC | Industry | SOC | Occupations |
| 41 | Local and Interurban | 53-3022 | Bus Drivers, School |
| 70 | Hotels | 37-2012 | Maids and Housekeeping Cleaners |
| 78 | Motion Pictures | 41-2021 | Counter and Rental Clerks |
| 38 | Instruments | 51-2092 | Team Assemblers |
| 72 | Personal Service | 39-5012 | Hairdressers, Hairstylists, and Cosmetologists |
| 72 | Pers Serve and Rep | 51-4121 | Welders, Cutters, Solderers, and Brazers |
| 41 | Local and Interurban | 53-3021 | Bus Drivers, Transit and Intercity |
| 22 | Textiles | 51-6063 | Textile Knitting and Weaving Machine Setters, Operators, and Tenders |
| 78 | Motion Pictures | 41-2011 | Cashiers |
| 30 | Rubber | 51-2092 | Team Assemblers |

Percentage of Laid-off Workers That Find Jobs

The number of workers that find jobs after being laid off is measured up to six quarters after the initial layoff occurs.

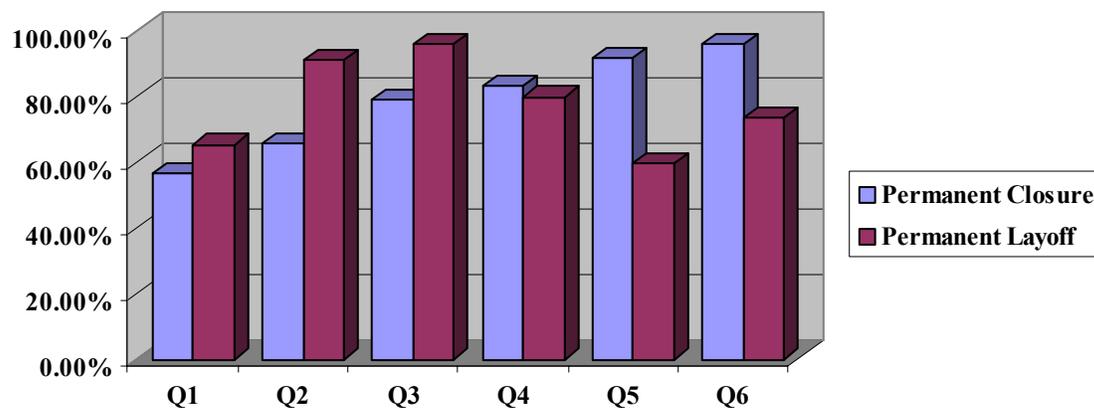
Southwest Region: Re-employment of Laid-off Workers (2001)



Worker Salaries Before and After Layoffs Occur

Southwest workers laid off in a permanent closure seem to increasingly gain close to their pre-layoff wage over a time period of six quarters. Southwest workers laid off in a permanent layoff however seem to fluctuate in terms of being able to earn at least 80% of their pre-layoff earnings.

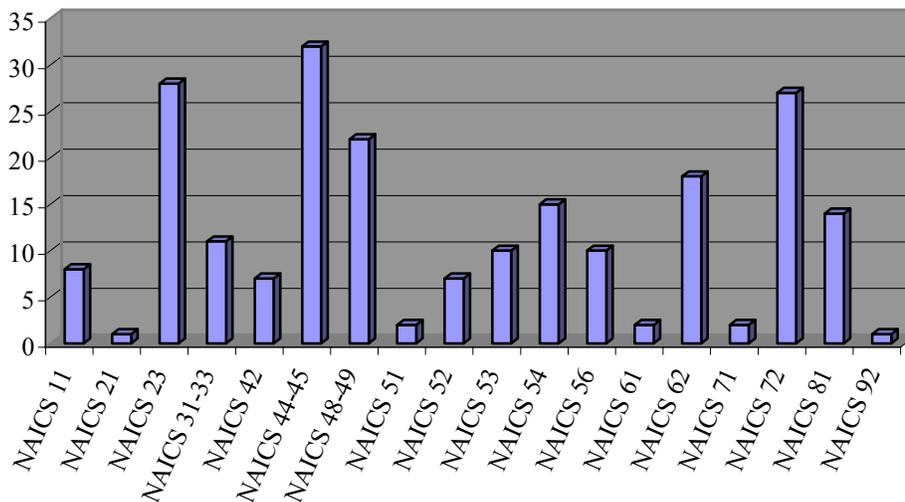
Post-Layoff Wage as a Percentage of Pre-Layoff Wage (2001)



The Impact of New Businesses Formations for a Region

The number of new businesses that formed in the Southwest region in 2003 was headed by businesses in the retail trade, construction, accommodation/food services, and transportation/warehousing sectors. Construction businesses saw the largest increase with over 85 new businesses forming in the region in 2003.

New Business Formations in Southwest WIA by Industry (2003)



| | |
|-------------|--|
| NAICS 11 | Agr., Forest., Fishing & Hunting |
| NAICS 21 | Mining, except oil and gas |
| NAICS 23 | Construction |
| NAICS 31-33 | Manufacturing |
| NAICS 42 | Wholesale Trade |
| NAICS 44-45 | Retail Trade |
| NAICS 48-49 | Transportation & Warehousing |
| NAICS 51 | Information |
| NAICS 52 | Finance & Insurance |
| NAICS 53 | Real Estate & Rental & Leasing |
| NAICS 54 | Professional, Scientific, & Technical Services |
| NAICS 56 | Administrative, Support, & Waste |
| NAICS 61 | Educational Services |
| NAICS 62 | Health Care & Social Assistance |
| NAICS 71 | Arts, Entertainment, & Recreation |
| NAICS 72 | Accommodation & Food Services |
| NAICS 81 | Other Services |
| NAICS 92 | Public Administration |

Source: MERIC, U.S. Bureau of Labor Statistics

Businesses With Slower Formation Growth

New business formation in the mining, information, arts/entertainment, and public administration sectors was considerably low in the Southwest region in 2003.

Regional Commuting Patterns

Department of
Economic Development

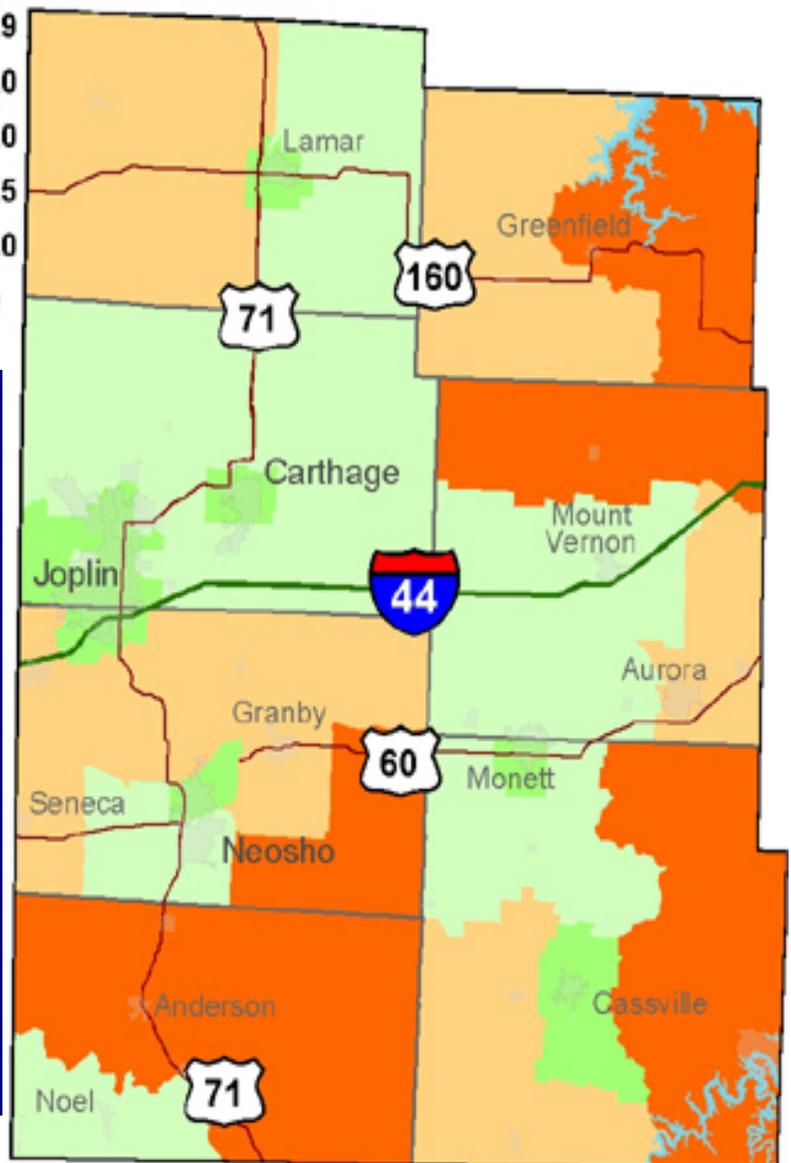
Driving to Work in the Region

The time that it takes a worker to commute to their occupation reflects the availability of jobs located within a region.

This mapping data is based on block-group level estimates from the census long form, which an average of 1 out of 6 households received. The maps should be used to reveal demographic patterns, not pinpoint exact block group values.

Source: MERIC, U.S. Census Bureau

Avg Commute (in Minutes)



The Time That it Takes Workers To Commute Within the Region

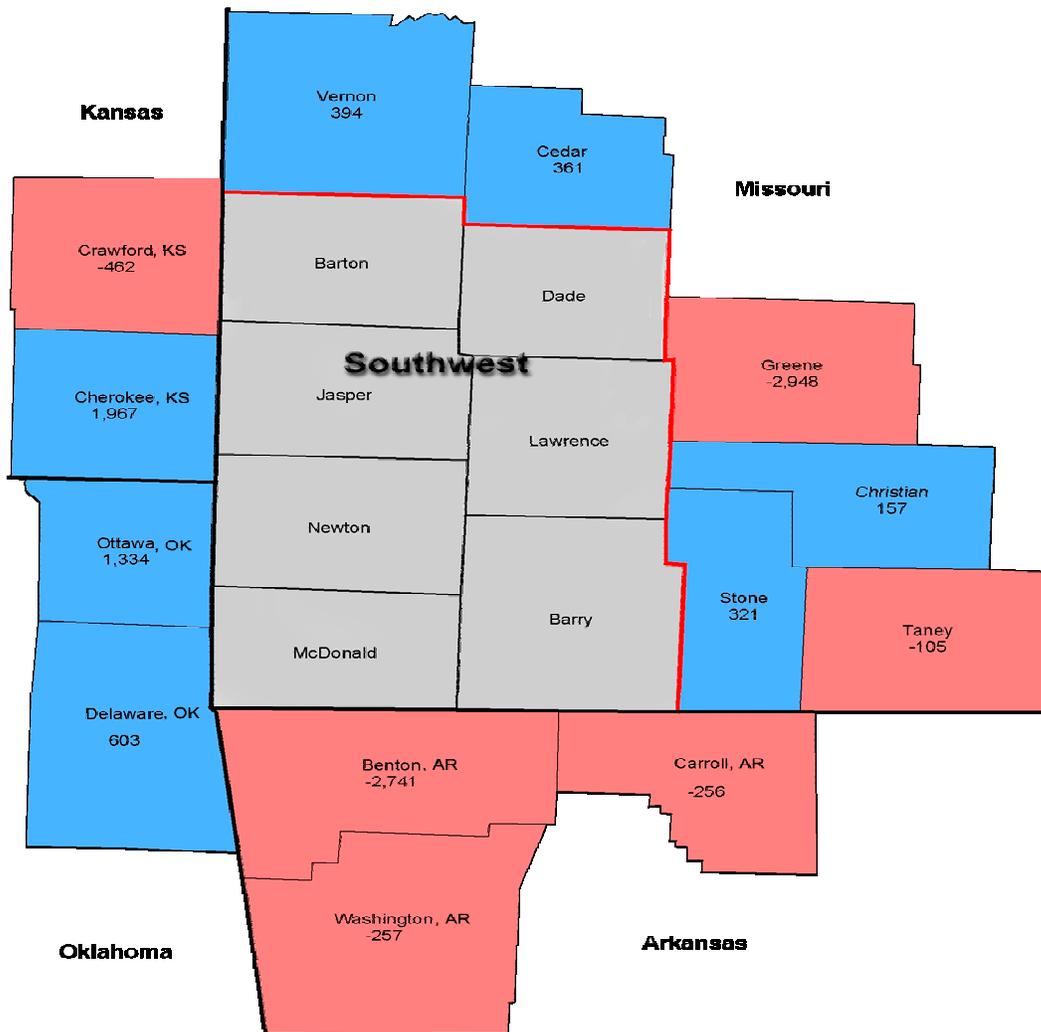
- A significant number of workers in Barry, Dade and McDonald counties have an average 34 to 48 minute commute to work.
- Based on the commuting patterns of workers in those counties, workers are most likely driving outside the WIA for work.

Source: MERIC, using U.S. Census Data

Workers Commuting In and Out of the Region

- Many workers commute outside of the Southwest WIA to work. In particular, job opportunities in Greene, Taney, Crawford (KS), Benton (AR), Carroll (AR), and Washington (AR) counties are drawing workers outside of the Southwest region.
- The region loses more than 3,000 net workers to nearby Arkansas counties. Another net 3,000 commute outside the region to Greene County, MO. However the region gains several thousand net workers from nearby Kansas and Oklahoma counties.

Source: MERIC, using U.S. Census Data

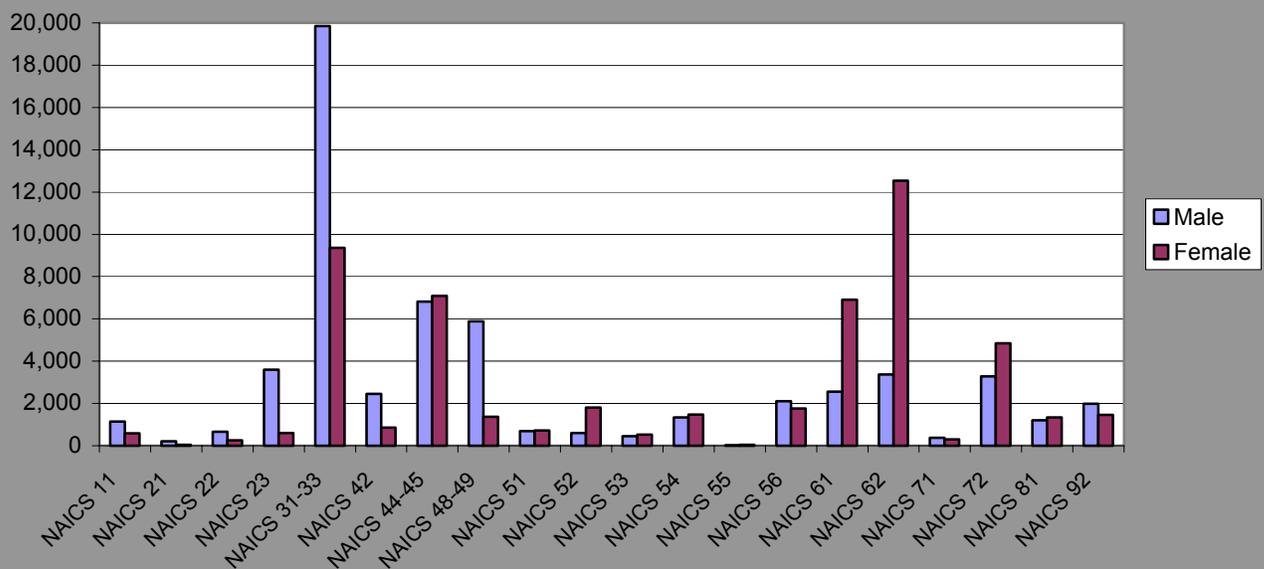


Composition of the Workforce

The Southwest region's workforce can be broken down in terms of age and gender composition by industry. The Southwest region's construction, manufacturing, and transportation sectors are predominantly staffed by male workers. The healthcare, educational services, and accommodation/food services sectors have mostly female workers.

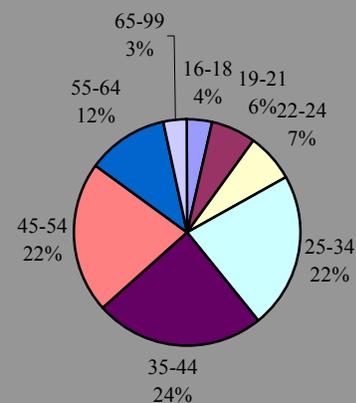
Southwest WIA Region

Makeup of the Southwest Workforce by Major Industry and Gender



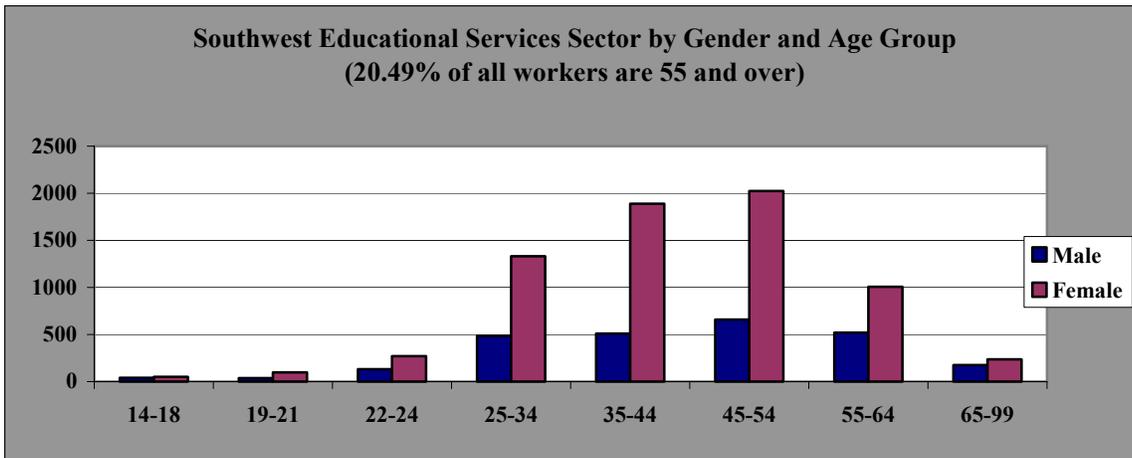
- NAICS 11 Agriculture, Forestry, Fishing and Hunting
- NAICS 21 Mining
- NAICS 22 Utilities
- NAICS 23 Construction
- NAICS 31-33 Manufacturing
- NAICS 42 Wholesale Trade
- NAICS 44-45 Retail Trade
- NAICS 48-49 Transportation and Warehousing
- NAICS 51 Information
- NAICS 52 Finance and Insurance
- NAICS 53 Real Estate and Rental and Leasing
- NAICS 54 Professional, Scientific, and Technic
- NAICS 55 Management of Companies and Enterprises
- NAICS 56 Administrative and Support and Waste
- NAICS 61 Educational Services
- NAICS 62 Health Care and Social Assistance
- NAICS 71 Arts, Entertainment, and Recreation
- NAICS 72 Accommodation and Food Services
- NAICS 81 Other Services (except Public Administration)
- NAICS 92 Public Administration

Workers by Age Group

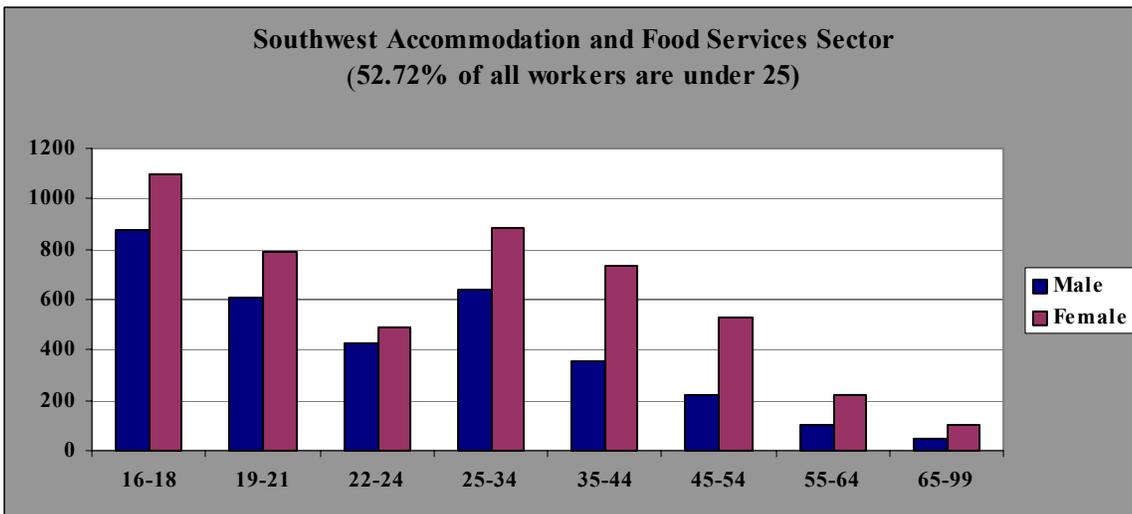


Age composition by industry can determine whether or not local colleges and technical schools are providing enough training for young workers who will be filling in the gaps left by those retiring.

Industry with a Significantly Aging Workforce



Industry with a Significantly Young Workforce



Source: LED, U.S. Census Bureau

What do These Results Mean?

The Educational Services sector has over 20% of its workforce over the age of 55. This means that in ten years this sector may potentially have problems finding enough qualified workers when their older workers retire. Meanwhile, many young workers find their first job opportunities in the accommodation and food services sector.

Acknowledgements

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December 15, 2004

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Additional economic information resources can be accessed on the Internet at www.missourieconomy.org.



Produced by:

Missouri Department of Economic Development
MERIC
301 W. High St. Room 580, Jefferson City, MO
65102
Tel: 573-751-3633; Fax: 573-751-7160
www.missourieconomy.org